US Department of Education

**FAFSA on the Web Redesign
Use Case Specification: Parents' Income Estimator
Worksheet**

Version 4.3

Revision History

Date	Version	Description	Author
11/6/00	1.0	Parents' Income Estimator Worksheet	Modernization Partner
11/15/00	2.0	Added Field Validation	Modernization Partner (Nan Li)
11/17/00	3.3	Added Diagrams Added Assumption Updated Related Use Cases Added Business Rules Added file names to Wireframes Renumbered Flow Elaborated Description	Modernization Partner (Nan Li & Jennifer Connelly)
12/7/00	4.0	Moved data field rules into Glossary Put URL links into Navigation Links section (Nina)	Modernization Partner (Nan Li & Jennifer Connelly)
1/23/01	4.1	Added Alternative Flow Diagram Removed General From Help in Navigation Links Added Previous and Next to Renew alternate flow Replaced "pops up" with "displays." Imbedded Basic Flow Wireframes	Modernization Partner (Jennifer Connelly)
3/5/01	4.2	No changes to be implemented from the change log. Updated wireframes	Modernization Partner
3/5/01	4.3	Accepted changes.	Modernization Partner

Table of Contents

Use Case Specification: Parents' Income Estimator Worksheet

1. Use Case Name: Parents' Income Estimator Worksheet

1.1 Brief Description

This use case describes how an Applicant completes the Parents' Income Estimator Worksheet. If your parents have not yet completed their 2000 taxes, this worksheet will help you figure out their adjusted gross income for 2000.

This is an "included" use-case for FillOut FAFSA, Renew FAFSA, or Correct FAFSA.

1.2 Note

- Navigation to get help messages is not documented in this use case. Please refer to "**FAFSA_WEB_Help.doc"** for more information.
- Description of concept, data, variables and database interactions is defined in "**FAFSA_WEB_Glossary.doc.**"
- Edit error process (validation and error display) is defined in "**FAFSA_WEB_Edit_Error.doc.**"

2. Actors

#	Actor Name	Actor Type
1	Applicant	Primary

3. Assumptions

#	Assumptions
1	Applicant enters all valid data into input fields
2	Applicant chooses to Fill Out a FAFSA.

4. Pre-Conditions

#	Pre-Conditions	Wireframe
1	Applicant begins at the Home Page	home.htm
2	Applicant selects: **COMPLETING A FAFSA**	Complete001.htm
3	Applicant selects: **FIRST TIME FAFSA ON THE WEB**	Complete013.htm
4	Applicant starts the **PARENTS' INCOME ESTIMATOR WORKSHEET** (Within the FAFSA Application)	\app\FillOutApp\filloutapp_step4d.htm

5. Post-Conditions
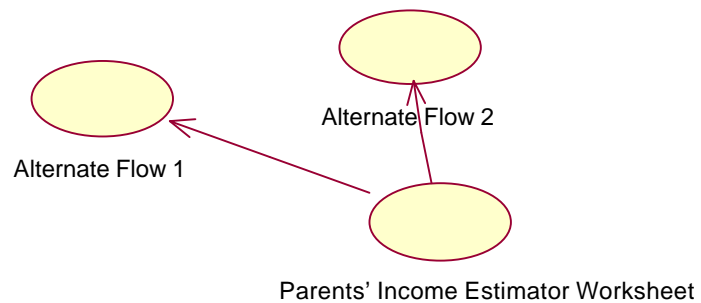
#	Post-Conditions	Wireframe
1	None	

6. Diagram

Applicant → Parents' Income Estimator Worksheet
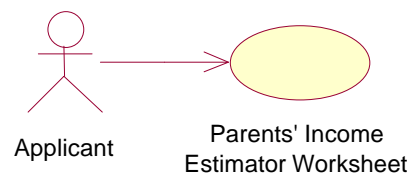
7. Alternate Flow Diagrams

Alternate Flow 1

Alternate Flow 2

Parents' Income Estimator Worksheet

8. Flow of Events

8.1 Basic Flow

Basic Flow				
#		Events	Data Elements	Wireframe
1	→	This use case begins when the Applicant starts the **PARENTS' INCOME ESTIMATOR WORKSHEET**		
2.1	←	System displays the Parents' Income Estimator.		\app\FilloutApp\filloutapp_step4d.htm
3	→	Applicant enters whole dollar amount to: Wages, salaries, tips, etc.	[szParIncWages]	
4	←	System calculates and updates: Total Estimated Income for your parents' for 2000 (Question #73)	[szPARAGI]	
5	→	Applicant enters whole dollar amount to: Interest Income	[szParIncInterests]	
6	←	System calculates and updates: Total Estimated Income for your parents' for 2000 (Question #73)	[szPARAGI]	
7	→	Applicant enters whole dollar amount to: Dividends	[szParIncDividends]	
8	←	System calculates and updates: Total Estimated Income for your parents' for 2000 (Question #73)	[szPARAGI]	
9	→	Applicant enters whole dollar amount to: Other taxable income (alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, Social Security, Railroad Retirement, and all other taxable income)	[szParIncOthers]	
10	←	System calculates and updates: Total Estimated Income for your parents' for 2000 (Question #73)	[szPARAGI]	
11	→	Applicant enters whole dollar amount to: IRS-allowable adjustments to income (payment to IRA and Keogh Plans, one half of self employment tax, self-employed health insurance deduction, interest penalty on early withdrawal of savings, alimony paid, and student loan interest deduction)	[szParIncAdjustments]	
12	←	System calculates and updates: Total Estimated Income for your parents' for 2000 (Question #73)	[szPARAGI]	
13	→	Applicant enters whole dollar amount to: Total Estimated Income for your parents' for 2000 (Question #73)	[szPARAGI]	
		NEXT		\app\FilloutApp\filloutapp_step4e.htm
		PREVIOUS		\app\FilloutApp\filloutapp_step4c.htm
		Use case ends.		

app\FillOutApp\filloutapp_step4d.htm

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2001 - 2002 FAFSA on the Web

FAFSA on the Web Intro

FAFSA Steps:

1 Info About You

2 Your Finances

3 Your Student Status

4 Your Parents' Info

5 Your Household Info

6 Schools to Receive Results

7 Provide Preparer Info

8 Review Completed FAFSA

9 Signatures

10 Submit Your FAFSA

Step 4: Provide Parents' Info   Page **1 2 3** 4 5 6 7 8 9

Need help with this page?

71. What income tax return did your parents file or will they file for 2000?

[Select ▼]

72. If your parents have filed or will file a 1040, were they eligible to file a 1040A or 1040EZ?

○ Yes

○ No

○ Don't Know

Select Yes if your parents filed or will file a 1040 but were eligible to file a 1040A or 1040EZ. In general, they are eligible to file a 1040A or 1040EZ if they:
· Make less than $50,000,
· Do not itemize deductions,
· Do not receive income from their own business or farm
· Do not receive self-employment income, or alimony, and
· Are not required to file Schedule D for capital gains

Select No if your parents filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

Select Don't Know if your parents filed or will file a 1040 and do not know whether they are eligible to file a 1040A or 1040EZ.

Parents' Income Estimator
If your parents' have not yet completed their 2000 taxes, this worksheet will help you figure out your parents' adjusted gross income for 2000. The calculated total will be entered on your FAFSA for Question 73.

All questions refer to income earned in the year 2000.

Wages, salaries, tips, etc.	Enter whole dollar amounts in this box, and do not use commas.

	$ [ ] .00
Interest Income	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00
Dividends	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00
Other taxable income (alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, Social Security, Railroad Retirement, and all other taxable income)	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00
IRS-allowable adjustments to income (payment to IRA and Keogh Plans, one half of self employment tax, self-employed health insurance deduction, interest penalty on early withdrawal of savings, alimony paid, and student loan interest deduction) *This amount will be subtracted to equal your parents' estimated income for the year 2000.*	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00

73. What was your parents' adjusted gross income for 2000?

[ ]

You can find this information on the following tax forms:
· IRS Form 1040-line 33;
· 1040A-line 19;
· 1040EZ-line 4; or
· Telefile-line I

If your parents have not yet completed their 2000 taxes, use the Parent Income Estimator Worksheet (above) to answer this question.

to answer this question.

Need help with this page?

[Previous]   [Next]

Previous   Next

[Save for Later]   [View FAFSA Summary]   [Exit]

Save for Later   View FAFSA Summary   Exit

Notes about this screen:

- If "Will not file" is selected for question #70, skip questions 71-75.

- Parent Income Estimator Worksheet will open up in new window. Value received from this worksheet will be inserted into answer field for Question 73

- If user selected "will not file" for Question #70, they will not need to go to Page 4 of Step 4, therefore, the "4" in the page navigation for Step 4 in the right hand corner of each screen will remain grey throughout step 4 and will not be a link. If the user selected any other answer for Question #70, the page navigation for "4" will be a link. In any case, the "2" will be colored in grey on pages 1, 2 and 3 of step 4 (filloutapp_step4a.htm, filloutapp_step4b.htm, filloutapp_step4c.htm)

URL Listing:

FAFSA on the Web logo: app/FillOutApp/exit_app.htm
FAFSA on the Web Intro: app/FillOutApp/filloutapp_intro.htm
Contact Us: app/FillOutApp/exit_app.htm
Help: app/FillOutApp/exit_app.htm
FAFSA FAQs: app/FillOutApp/exit_app.htm
Info About You: app/FillOutApp/filloutapp_step1a.htm
Your Fianaces: app/FillOutApp/filloutapp_step2a.htm
Your Student Status: app/FillOutApp/filloutapp_step3a.htm
1: app/FillOutApp/filloutapp_step4a.htm
2: app/FillOutApp/filloutapp_step4c.htm
3: app/FillOutApp/filloutapp_step4c.htm
Need help with this page?: app/page_help/chelp_s4p4.htm
1040EZ or Telefile: /Shared_Pages/chelp_sample.htm

Previous: app/FillOutApp/filloutapp_step4c.htm
Next: app/FillOutApp/filloutapp_step4e.htm
Save for Later: app/FillOutApp/save_app.htm
View FAFSA Summary: app/Shared_Pages/FAFSA_summary.htm
Exit: app/Shared_Pages/exit_app.htm

Image File Listing:

TBD

8.2 Alternative Flows

Alternate Course 1
Title: Applicant chooses to Renew a FAFSA
Assumptions:

#	Assumptions
1	Applicant enters valid field data.
2	Applicant chooses to Renew a FAFSA

Pre-Conditions:

#	Pre-Conditions	Wireframe
1	Applicant begins at the home page	home.htm
2	Applicant selects: **COMPLETING A FAFSA**	Complete001.htm
3	Applicant selects: **RENEWAL FAFSA ON THE WEB**	Complete004.htm
4	Applicant starts the **PARENTS' INCOME WORKSHEET** (Within Renew FAFSA Application)	app\RenewApp\renewapp_step4d.htm

Alternative Flow				
#		Events	Data Elements	Wireframe
2.2	←	System displays the Parents' Income Worksheet		app\RenewApp\renewapp_step4d.htm
		Continue at #3 – #13		
		NEXT		app\RenewApp\renewapp_step4e.htm
		PREVIOUS		app\RenewApp\renewapp_step4c.htm
		Use case ends.		

Alternate Flow Specific Business Rules:

#	Business Rules
1	Selecting **EXIT** button will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and home.htm as parameter for destination
2	Selecting **FAFSA ON THE WEB LOGO** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and home.htm as parameter for destination
3	Selecting **HOME** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and home.htm as parameter for destination
4	Selecting **CONTACT US** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and contact.htm as parameter for destination
5	Selecting **HELP** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and help.htm as parameter for destination
6	Selecting **FAFSA FAQ** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and FAQ001.htm as parameter for destination
7	Selecting **NEED HELP WITH THIS PAGE** will continue at template page specific help passing current URL as parameter
8	Selecting **SAVE FOR LATER** will continue at use case **Save for Later** passing current URL as parameter
9	Selecting **VIEW FAFSA SUMMARY** will continue at View FAFSA Summary use case. (app\Shared_Pages\FAFSA_summary.htm)
10	Selecting **INFO ABOUT YOU** will continue at app\RenewApp\renewapp_step1a.htm
11	Selecting **YOUR FINANCES** will continue at app\RenewApp\renewapp_step2a.htm
12	Selecting **YOUR STUDENT STATUS** will continue at app\RenewApp\renewapp_step3a.htm
13	Selecting **YOUR PARENTS' INFO** will continue at app\RenewApp\renewapp_step4a.htm

app\RenewApp\renewapp_step4d.htm

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2001 - 2002 FAFSA on the Web Renewal

FAFSA on the Web Home

Renewal FAFSA on the Web Intro

FAFSA Steps:

1 Info About You

2 Your Finances

3 Your Student Status

4 Your Parents' Info

5 Your Household Info

6 Schools to Receive Results

7 Provide Preparer Info

8 Review Completed FAFSA

9 Signatures

10 Submit Your FAFSA

Step 4: Provide Parents' Info

Page **1 2 3** 4 5 6 7 8 9

Need help with this page?

71. What income tax return did your parents file or will they file for 2000?

Select ▼

72. If your parents have filed or will file a 1040, were they eligible to file a 1040A or 1040EZ?

☐ Yes
☐ No
☐ Don't Know

Select Yes if your parents filed or will file a 1040 but were eligible to file a 1040A or 1040EZ. In general, they are eligible to file a 1040A or 1040EZ if they:
· Make less than $50,000,
· Do not itemize deductions,
· Do not receive income from their own business or farm
· Do not receive self-employment income, or alimony, and
· Are not required to file Schedule D for capital gains

Select No if your parents filed or will file a 1040 and were not eligible to file a 1040A or 1040EZ.

Select Don't Know if your parents filed or will file a 1040 and do not know whether they are eligible to file a 1040A or 1040EZ.

Parents' Income Estimator
If your parents' have not yet completed their 2000 taxes, this worksheet will help you figure out your parents' adjusted gross income for 2000. The calculated total will be entered on your FAFSA for Question 73.

All questions refer to income earned in the year 2000.

Wages, salaries, tips, etc.

Enter whole dollar amounts in this box, and do not use commas.

$ [   ] .00

Interest Income	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00
Dividends	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00
Other taxable income (alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, Social Security, Railroad Retirement, and all other taxable income)	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00
IRS-allowable adjustments to income (payment to IRA and Keogh Plans, one half of self employment tax, self-employed health insurance deduction, interest penalty on early withdrawal of savings, alimony paid, and student loan interest deduction) *This amount will be subtracted to equal your parents' estimated income for the year 2000.*	Enter whole dollar amounts in this box, and do not use commas. $ [ ] .00

73. What was your parents' adjusted gross income for 2000?

[   ]

You can find this information on the following tax forms:
· IRS Form 1040-line 33;
· 1040A-line 19;
· 1040EZ-line 4; or
· Telefile-line I

If your parents have not yet completed their 2000 taxes, use the Parent Income Estimator Worksheet (above) to answer this question.

to answer this question.

Need help with this page?

[Previous]   [Next]

Previous   Next

[Save for Later]   [View FAFSA Summary]   [Exit]

Save for Later   View FAFSA Summary   Exit

Notes about this screen:

- If "Will not file" is selected for question #70, skip questions 71-75.

- Parent Income Estimator Worksheet will open up in new window. Value received from this worksheet will be inserted into answer field for Question 73

- If user selected "will not file" for Question #70, they will not need to go to Page 4 of Step 4, therefore, the "4" in the page navigation for Step 4 in the right hand corner of each screen will remain grey throughout step 4 and will not be a link. If the user selected any other answer for Question #70, the page navigation for "4" will be a link. In any case, the "2" will be colored in grey on pages 1, 2 and 3 of step 4 (renewapp_step4a.htm, renewapp_step4b.htm, renewapp_step4c.htm)

URL Listing:

FAFSA on the Web logo: app/RenewApp/exit_renew.htm
FAFSA on the Web Intro: app/RenewApp/renewapp_intro.htm
Contact Us: app/RenewApp/exit_renew.htm
Help: app/RenewApp/exit_renew.htm
FASFA FAQs: app/RenewApp/exit_renew.htm
Info About You: app/RenewApp/renewapp_step1a.htm
Your Finances: app/RenewApp/renewapp_step2a.htm
Your Student Status: app/RenewApp/renewapp_step3a.htm
1: app/RenewApp/renewapp_step4a.htm
2: app/RenewApp/renewapp_step4b.htm
3: app/RenewApp/renewapp_step4c.htm
Need help with this page?: app/page_help/chelp_s4p4.htm
Previous: app/FillOutApp/filloutapp_step4c.htm

Next: app/RenewApp/renewapp_step4e.htm
Save for Later: app/RenewApp/save_renew.htm
View FAFSA Summary: app/Shared_Pages/FAFSA_summary.htm
Exit: app/RenewApp/exit_renew.htm

Image File Listing:

TBD

Alternate Course 2
Title: Applicant chooses to Correct a FAFSA
Assumptions:

#	Assumptions
1	Applicant enters valid field data.
2	Applicant chooses to Correct a FAFSA

Pre-Conditions:

#	Pre-Conditions	Wireframe
1	Applicant begins at the home page	home.htm
2	Applicant selects: **COMPLETING A FAFSA**	Complete001.htm
3	Applicant selects: **MAKE CORRECTIONS TO A SUBMITTED FAFSA**	Complete014.htm
4	Applicant starts the **PARENTS' INCOME WORKSHEET** (Within Correct FAFSA Application)	Dynamically generate page. See FAFSA_WEB_CORRECTION.doc

Alternative Flow				
#		Events	Data Elements	Wireframe
2.3	←	System displays the Parents' Income Worksheet		Dynamically generate page. See FAFSA_WEB_CORRECTION.doc
		Continue at #3 – #13		
		Use case ends.		

Alternate Flow Specific Navigation Links:

#	Navigation Links
1	Selecting **EXIT** button will continue at use case **Exit FAFSA** passing current URL as parameter
2	Selecting **NEED HELP WITH THIS PAGE** will continue at template page specific help passing current URL as parameter
3	Selecting **FAFSA ON THE WEB LOGO** will continue at use case **Exit FAFSA** passing current URL as parameter
4	Selecting **HOME** will continue at use case **Exit FAFSA** passing current URL as parameter
5	Selecting **CONTACT US** will continue at use case **Exit FAFSA** passing current URL as parameter
6	Selecting **HELP** will continue at use case **Exit FAFSA** passing current URL as parameter
7	Selecting **FAFSA FAQ** will continue at use case **Exit FAFSA** passing current URL as parameter
8	Selecting **SAVE FOR LATER** will continue at use case **Save for Later** passing current URL as parameter
9	Selecting **VIEW FAFSA SUMMARY** will continue at View FAFSA Summary use case. (app\Shared_Pages\FAFSA_summary.htm)
10	Selecting **CORRECTIONS ON THE WEB INTRO** will continue at app\CorrApp\corrapp_intro.htm
11	Selecting **INFO ABOUT YOU** will continue at app\CorrApp\corrapp_1.htm
12	Selecting **YOUR FINANCES** will continue at app\CorrApp\corrapp_2.htm
13	Selecting **YOUR STUDENT STATUS** will continue at app\CorrApp\corrapp_3.htm
14	Selecting **YOUR PARENTS' INFO** will continue at app\CorrApp\corrapp_4.htm
15	Selecting **YOUR HOUSEHOLD INFO** will continue at app\CorrApp\corrapp_5.htm
16	Selecting **SCHOOLS TO RECEIVE RESULTS** will continue at app\CorrApp\corrapp_6.htm
17	Selecting **PROVIDE PREPARER INFO** will continue at app\CorrApp\corrapp_7.htm
18	Selecting **SIGNATURE** will continue at app\CorrApp\corrapp_sign1.htm
19	Selecting **SUBMIT** will continue at app\CorrApp\corrapp_submit1a.htm

9. Business Rules

#	Business Rules
1	All questions refer to income earned in the year 2000.
2	All numbers are limited to 999,999. If the total or subtotal is greater than 999,999, it will be changed to 999,999.
3	If a field is blank, treat the value as 0.
4	If applicant enters data into other fields in the worksheet, the total will be recalculated and the total field will be updated. Applicant can enter values into the total field. However, the entered total can only be taken when other input fields in the worksheet are left blank. Otherwise, the entered total will be discarded and the calculated total will be used.
5	By default, applicant can skip any data entry field. Fields that cannot be skipped will either have specification in Data Element field or have validation function ISNOTBLANK() listed for the variables that hold the input data, in Glossary.

10. Navigation Links

#	Navigation Links
1	Selecting **EXIT** button will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and home.htm as parameter for destination
2	Selecting **FAFSA ON THE WEB LOGO** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and home.htm as parameter for destination
3	Selecting **HOME** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and home.htm as parameter for destination
4	Selecting **CONTACT US** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and contact.htm as parameter for destination
5	Selecting **GENERAL HELP** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and help.htm as parameter for destination
6	Selecting **FAFSA FAQ** will continue at use case **Exit FAFSA** passing current URL as parameter for origination, and FAQ001.htm as parameter for destination
7	Selecting **NEED HELP WITH THIS PAGE** will continue at template page specific help passing current URL as parameter
8	Selecting **SAVE FOR LATER** will continue at use case **Save for Later** passing current URL as parameter
9	Selecting **VIEW FAFSA SUMMARY** will continue at View FAFSA Summary use case. (app\Shared_Pages\FAFSA_summary.htm)
10	Selecting **FAFSA ON THE WEB INTRO** will continue at app\FillOutApp\filloutapp_intro.htm
11	Selecting **INFO ABOUT YOU** will continue at app\FillOutApp\filloutapp_step1a.htm

11. Related Use Cases

#	Related Use Cases
1	Fill Out FAFSA
2	Renew FAFSA
3	Correct FAFSA